



Manufacturing in Virginia

SIC 22 Textile Mill Products



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Overall Assessment

- Virginia's largest industry in 1949, seventh in 2000.
- Nationally was fourth largest manufacturing industry in 1949, sixteenth today.
- Industry lost 40 percent of its Virginia employment since 1969 (versus a 46 percent loss nationally).
- Ranks seventeenth in annual wages per employee (eighteenth nationally).

Employment

	Virginia		U.S.	
	Employment	Rank	Employment	Rank
1949	37,900	1	1,103,000	4
1969	44,100	2	1,002,500	10
2000	26,300	7	541,300	16

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment Trends

Absolute Employment Growth

	Virginia		U.S.	
	Absolute Employment Change	Rank	Absolute Employment Change	Rank
1949-2000	-11,600	12	-561,700	13
1949-1969	+6,200	8	-100,500	13
1969-2000	-17,800	15	-461,200	15

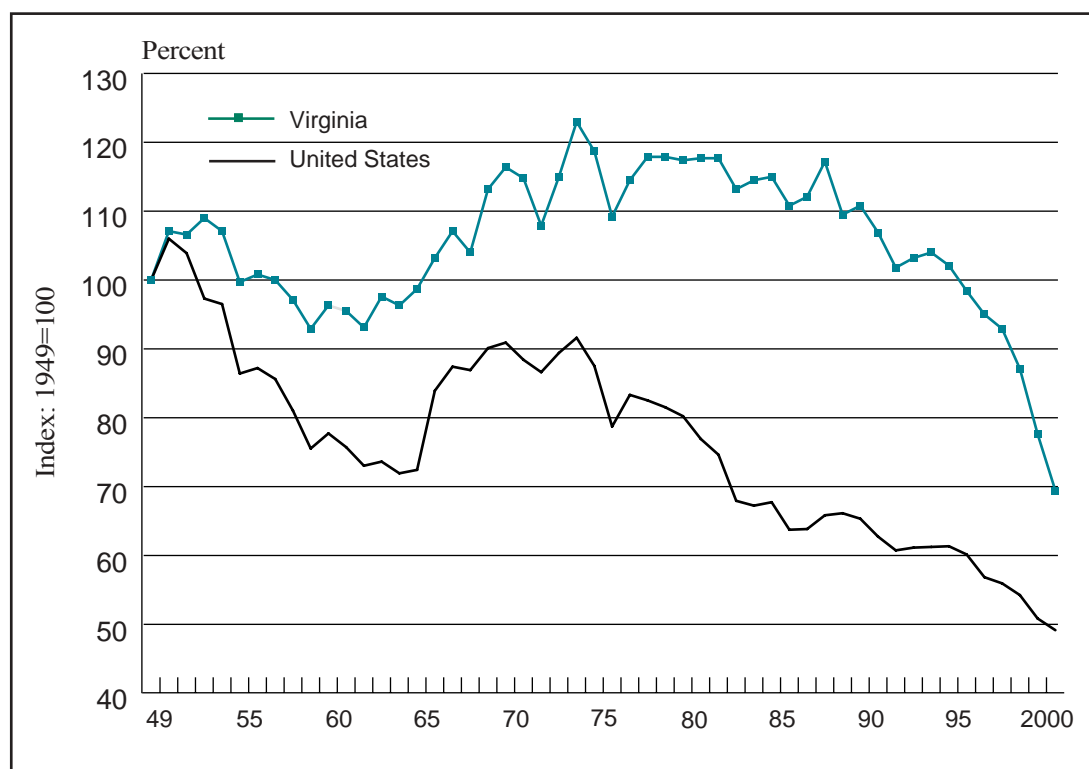
Source: U.S. Department of Labor, Bureau of Labor Statistics.

Relative Employment Growth

Virginia Annual Average Growth Rates						
	Growth Rate 1949-2000	Rank	Growth Rate 1949-69	Rank	Growth Rate 1969-2000	Rank
Textiles Mill Products						
Virginia	-0.7%	11	0.8%	11	-1.7%	13
U.S.	-1.4%	12	-0.5%	11	-2.0%	14
Nonagricultural Employment	3.0%		3.1%		2.9%	
Manufacturing	1.1%		2.6%		0.2%	
Nondurable Goods	0.4%		2.0%		-0.6%	

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment Change 1949-2000



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Establishments

Number of Establishments

	Virginia		U.S.	
	Establishments	Rank	Establishments	Rank
Textile Mill Products	130	16	6,819	17
Manufacturing	6,908	--	413,506	--
Textile Mill Products as a % of Mfg.	1.9%		1.6%	

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment per Establishment

	Virginia		U.S.	
	Employment	Rank	Employment	Rank
Textile Mill Products	222	2	82	6
Manufacturing	57	--	45	--

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Payroll

Payroll per Employee

	Virginia		U.S.	
	Payroll per Employee	Rank	Payroll per Employee	Rank
Textile Mill Products	\$25,442	17	\$28,027	18
Manufacturing	\$35,767	- -	\$41,941	- -
Textile Mill Products as a % of Mfg.	71.1%		66.8%	

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Exports

Virginia Exports		
	Textile Mill Products	Manufacturing
2000	\$103,497,000	\$9,395,636,000
1995	\$99,576,000	\$9,294,115,000
Export Growth, 1995-2000	3.9%	1.1%
Share of Manufactured Goods Exports, 2000	1.1%	- -

Source: U.S. Department of Commerce.

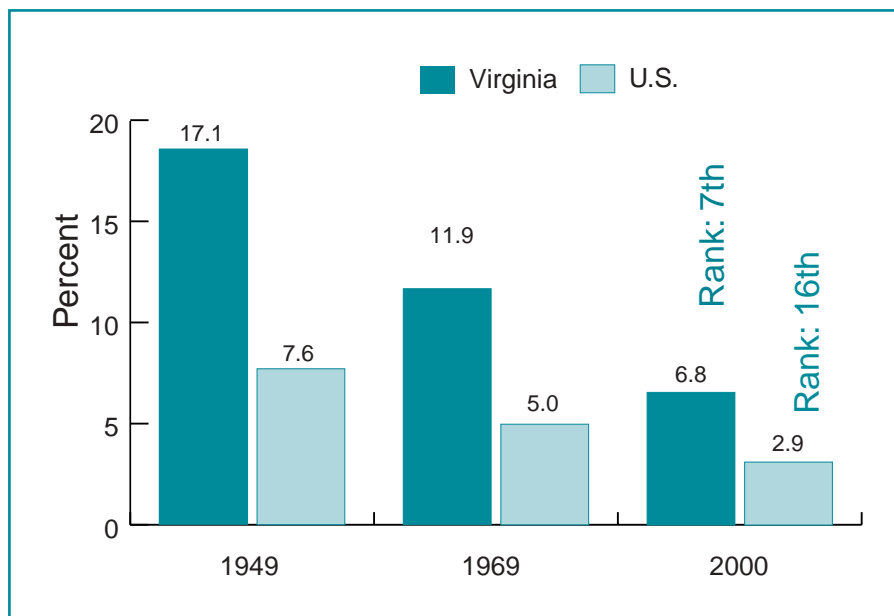
Industry Importance

Virginia's Share of National Textile Mill Products Industry



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry's Share of Manufacturing Employment



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Trends

Virginia employment distribution: knitting mills (27 percent); broadwoven fabric mills, cotton (22 percent); broadwoven fabric mills, manmade (11 percent); textile finishing, except wool (9 percent); miscellaneous textile goods (7 percent); yarn and thread mills (7 percent); and narrow fabric mills (5 percent).

- Employment in Virginia and the U.S. has been on a long-term, overall downward trend for nearly the last three decades, and capacity utilization stands at its lowest level in the past twenty years. International competition, increasing productivity, and consolidation are factors contributing to this trend. Textile manufacturers have advanced productivity through automation and technological improvement, thereby maintaining output while requiring fewer workers.
- Vertical integration is increasingly occurring with textile mills moving into apparel manufacturing-selling the fabric produced in the form of garments. Some mills are even offering a complete package of arranging garment production, transportation and logistics.
- Areas of potential growth include the carpet and miscellaneous textile market. These synthetic-based products depend on research and highly mechanized production, areas where the U.S. has a competitive advantage.
- Exports will grow marginally over the next five years. Imports account for approximately 13 percent of apparent domestic consumption.